



## Application for One-on-One Consulting Support

### Introduction

The Technical Assistance Collaborative (TAC) provides support for Chicagoland Jewish nonprofits to clarify problems resulting from the COVID-19 crisis, identify solutions, and implement and scale recommendations. TAC connects organizations with an array of expertise, including webinars, cohort learning, and one-on-one consultations with experts that organizations may otherwise not be able to access. TAC is generously funded by local Jewish funders and JUF and delivered in partnership with Boardified.

### Instructions

To apply for expert one-on-one consultation support, please complete the questions on pages 3-8 and submit it via email to [technicalassistance@boardified.org](mailto:technicalassistance@boardified.org). Organizations can apply for up to three areas of consulting support; ***in section IV, organizations only need to complete the questions related to the areas of support they are requesting.*** Applications will be accepted and reviewed on a rolling basis. Unfortunately, due to limited resources, TAC is not able to support every organization that applies.

After completing this application, organizations may have a subsequent intake conversation with members of the TAC team. The application and intake conversations are kept confidential and meant to understand and identify the immediate needs of the organization. No information provided in the application, intake conversation, or consulting engagement will impact current or future funding from members of the TAC.

If awarded one-on-one consultation support, organizations will be matched with a service provider for a certain number of hours (e.g., ten hours of financial planning or fifteen hours of executive coaching). The one-on-one consultation process could take several months to complete depending on the scope of the project(s). Communication and information provided to the service provider will be kept strictly confidential between the organization and service provider.

### Reporting

Organizations awarded hours with a consultant will be required to fill out a brief evaluation at the end of the engagement to ensure that the intake process, matching, and overall initiative is helping meet organizational needs.

### Eligibility Criteria for One-on-One Consultations

To apply for and receive one-on-one consulting support, organizations must meet the below criteria. Priority will be given to organizations who have participated in other TAC offerings (i.e., community/cohort learning opportunities).

Organizations must:

- Serve the Jewish community in the Chicagoland area and possess a current 501(c)(3) status. Organizations who are fiscally sponsored are also eligible but must provide appropriate documentation.
- Request assistance for challenges related to the COVID-19 pandemic.
- Request assistance that is limited in scope and does not support an ongoing need (e.g., long-term strategic planning or staff position) or capital expenditure.
- Have the capacity to work with a consultant and dedicate time and resources to the engagements.
- Approach the consultant with openness and have institutional readiness to execute the consultant's advice in a timely fashion.
- Have board and senior staff support of the engagement.

## Application Questions

Please answer the questions below by typing your response next to or under each question. Guidance around answer length has been provided below in *blue*.

### I. Contact Information

Executive Director/CEO contact information

- Name:
- Title:
- Email:
- Phone:

Applicant contact information

- Name:
- Title:
- Email:
- Phone:

Board Chair/President contact information

- Name:
- Email:
- Phone:

### II. Organization Information

Legal name:

Website:

Address:

Year organization was founded:

Background information, including mission of organization, community and individuals served, and services provided. *Please limit your answer to 2-3 paragraphs:*

### III. Definitions of Areas of Support

- **Financial Planning and Modeling:** The process of reviewing an organization's finances and financial systems in order to help an organization create effective tools to track and forecast financial performance.
- **Scenario Planning:** A method of deconstructing the uncertainty of the current moment through crafting a set of possible future states and strategically establishing potential courses of action for each of those identified future states. The goal is to develop organizational resilience and to be able to adapt decision-making to a shifting landscape.

- **Capacity Building Assistance:** A broad term that encompasses any means by which an organization improves its ability to fulfill its mission and grow its impact (e.g., board development, professional development, program assessment and implementation, etc.).
- **Senior Staff/Board Coaching:** A professional who works with individuals and/or teams (usually executives, senior staff professionals, or board chairs) to help them clarify goals, achieve organizational or personal objectives, and act as a confidential sounding board.
- **Legal Consultation (e.g., employment law, insurance review, mergers & acquisitions):** Legal consultation support is meant to solve a specific legal problem.
- **Technology and Communications Consultation:** This includes one-on-one assistance around analyzing and improving an organization's software system, technology use, and social media, as well as internal and external communications strategies.
- **Fundraising Support:** Fundraising consultants can help strategize and reimagine fundraising tactics in this virtual world. Fundraising consultants can also help organizations identify prospective donors, develop stewardship plans and train the board or staff on donor cultivation, fundraising strategies, and goals.

#### IV. Support Questions

*Please only answer the questions related to the 1-3 areas of consulting support you are requesting. Organizations can apply for up to three areas of consulting support. **Please be concise in your responses; for longer answers, please limit to no more than 3 paragraphs.***

#### Financial Planning and Modeling

- What issue are you concerned about and why do you think working with a financial modeling consultant will help solve this issue? What are you hoping to learn from the consultant (i.e., what are your goals)?
- Did you have this issue before the pandemic and what has changed (if anything)?
- If you have worked with a consultant on this issue in the past, who did you work with and would you want to work with them again? We cannot guarantee that you will be matched with the same provider.
- How engaged is your board in helping you solve this issue and in what way?
- Do you have a Chief Financial Officer or someone dedicated to financial planning? What is their level of expertise in this area?
- Do you have a board approved budget for this fiscal year? Do you anticipate a deficit?
- Who would be the primary staff or lay person leading this effort with the consultant? Does this person have the time, willingness, and bandwidth to work on this project?
- What is the person's contact information if other than applicant's contact information?

### **Scenario Planning**

- Have you been able to think strategically about what the next few years might bring? Have you thought about future risks or opportunities and how you might mitigate or prepare for them? Please explain.
- Have you engaged your board in scenario planning and how they might help your organization with decision-making and the impact different courses of action will have on your operations? Please explain.
- Have you ever worked with a consultant on scenario planning or do you have a staff or board member that does scenario planning? If so, who?
- What are you hoping to learn from the consultant (i.e., what are your goals)?
- Who would be the primary staff or lay person leading this effort with the consultant? Does this person have the time, willingness, and bandwidth to work on this project?
- What is the person's contact information if other than applicant's contact information?

### **Capacity Building Assistance**

- Please provide a brief description of the issue your organization is facing and why you think working with a consultant will help you.
- Did you have this issue before the pandemic and what has changed (if anything)?
- How engaged is your board on this topic and in what way? Please explain.
- Have you recently worked with a consultant on this issue? If so, who and would you want to work with them again? We cannot guarantee that you will be matched with the same provider.
- What have you done recently to grow your impact (e.g., professional development, program assessment, infrastructure changes, etc.) and how has your strategy changed since the pandemic?
- Who would be the primary staff or lay person leading this effort with the consultant? Does this person have the time, willingness, and bandwidth to work on this project?
- What is the person's contact information if other than applicant's contact information?

### **Senior Staff/Board Coaching**

- Who needs coaching and why?
- What are your goals? What are the challenges you are working through?
- Did these challenges exist before the pandemic and what has changed (if anything)?
- Does this individual or team of individuals have the time, willingness, and bandwidth to work with a coach?
- If requesting coaching for an individual, what is their contact information if other than applicant's contact information?

- Has this individual or the board worked with a coach before? If so, who and would you want to work with this coach again? What did you work on with the coach? We cannot guarantee that you will be matched with the same coach.

### **Legal Consultation**

- What issue are you concerned about and why do you think an attorney will help solve this issue?
- Did you have this issue before the pandemic and what has changed (if anything)?
- What have you done thus far to solve this issue?
- How engaged is your board on this topic and in what way? Please explain.
- Have you recently worked with a consultant or attorney on this issue? If so, who and would you want to work with them again? Please note the attorney's law firm. We cannot guarantee that you will be matched with the same provider.
- What are you hoping to learn from the attorney (i.e., what are your goals)?
- Who would be the primary staff or lay person leading this project? Does this person have the time, willingness, and bandwidth to work with an attorney?
- What is the person's contact information if other than applicant's contact information?

### **Technology and Communications Consultation**

- What social media, technology, or communication strategy issues are you concerned about and why do you think working with a consultant will help solve these issues?
- What are you hoping to learn from the consultant (i.e., what are your goals)?
- What software or social media platforms are you currently using to support virtual programming (if any)?
- How are you currently communicating with your constituents and how have your communications changed since the pandemic?
- How engaged is your board on this topic and in what way? Please explain.
- Who is responsible for managing social media and technology at your organization? What is their level of expertise in this area?
- Have you recently worked with a consultant on these issues? If so, who and would you want to work with them again? We cannot guarantee that you will be matched with the same provider.
- Who would be the primary staff or lay person leading this project? Does this person have the time, willingness, and bandwidth to work with a consultant?
- What is the person's contact information if other than applicant's contact information?

## Fundraising Support

- What are your biggest fundraising concerns right now? Please provide a brief description of the fundraising challenges your organization is facing.
- Describe your current fundraising efforts (e.g., annual, capital, endowment campaigns, virtual or in-person events or galas, mail or email solicitations, etc.).
- How has your organization's fundraising strategy changed since the pandemic? What has worked and what has not worked?
- Do you anticipate meeting your fundraising goals this fiscal year? Please explain.
- Do you have a Development Director or Chief Advancement Officer? How long have they held their position and what is their level of expertise in fundraising? If not, who is responsible for spearheading fundraising efforts?
- How engaged is your board in fundraising and in what way? Do you have 100% board giving?
- Do you have a donor management database and is someone responsible for maintaining it? Please note the database you use.
- Have you recently worked with a consultant on these issues? If so, who and would you want to work with them again? We cannot guarantee that you will be matched with the same provider.
- What are you hoping to learn from the fundraising consultant (i.e., what are your goals)?
- Who would be primary staff or lay person leading this project? Does this person have the time, willingness, and bandwidth to work with a consultant?
- What is the person's contact information if other than applicant's contact information?

## V. General Questions

*Please respond to each question below.*

- If requesting multiple areas of support, please rank them in order of priority (1=highest priority and 3=lowest priority). Only rank the areas you applied for in this application.
  - Financial Planning and Modeling:
  - Scenario Planning:
  - Capacity Building Assistance:
  - Senior Staff/Board Coaching:
  - Legal Consultation:
  - Technology and Communications Consultation:
  - Fundraising Support:
- How concerned are you about your organization's financial picture over the next 6-12 months (1=not concerned and 10=extremely concerned)?

- How prepared is your organization (both staff and board) to navigate this crisis in the short-term (1=not prepared and 10=extremely prepared OR “I don’t know”)?
- How prepared is your organization (both staff and board) to navigate this crisis in the long-term (1=not prepared and 10=extremely prepared OR “I don’t know”)?
- Do you currently have a plan to navigate the pandemic and has progress been made on this plan and its goals (if any)? How do you measure progress? *Please be concise and limit your answer to no more than 2 paragraphs.*
- Has there been a senior leadership transition recently (staff or board)? If so, please describe. *Please be concise and limit your answer to no more than 2 paragraphs.*
- What size is your budget?
- If awarded one-on-one consultation support, do you commit to filling out a brief evaluation at the end of the engagement? (Yes/No)
- When is your staff ready to engage with the consultant? Please highlight in yellow.  
Immediately                      Next Month                      Next 2-3 Months
- Is there anything else you would like to share with us?